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Central Intelligence Agency

Washington, D.C. 20505

30 December 1985

CEMA's Troubled Soft Goods Industries: A Soviet Perspective

SUMMARY

Faced with chronic shortages of common consumer items and production bottlenecks in light industry, Moscow is stepping up pressure on its CEMA allies for assistance. A confidential Soviet study reveals Soviet disappointment with Eastern Europe's past contribution in the area of soft goods--textiles, clothing, shoes, and other apparel. The Soviet authors complain that the East European countries have badly neglected their consumer industries, re-exported Soviet deliveries of raw materials to the West to earn hard currency, become too dependent on Western equipment, and failed to live up to trade pledges and commitments under CEMA specialization agreements. The report projects that slow growth in CEMA production of soft goods through the year 2000 will leave Soviet consumers far short of Soviet norms. The report, which was prepared about a year ago in connection with the USSR's Long Term Consumer Goods and Services Program recommends that Eastern Europe increase exports of soft goods by a third by the end of this century. Moscow's effort to force Eastern Europe to devote more attention to satisfying the Soviet market at the expense of Eastern Europe's hard currency sales and domestic supplies is likely to lead to strained negotiations and warnings by East European leaders of the risks of major changes in allocation of supplies of consumer goods. Both sides have taken these positions for many years, but the apparently strengthened Soviet determination combined with Eastern Europe's greater needs leads us to expect more bickering than ever between Moscow and its allies. [redacted] 25X1

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CEMA's Troubled Soft Goods Industries: A Soviet Perspective

Mikhail Gorbachev, in his first statements as General Secretary, emphasized that one of his most urgent and difficult tasks will be to increase the supply of consumer goods. Slowing gains in living standards, chronic shortages of common consumer items, and the poor quality and assortment of these products have contributed to lackluster performance by Soviet workers. Indeed, the Soviet leader has raised the ante for greater availability of consumer goods with his current anti-alcohol campaign. To keep workers' attention off the bottle and to soak up excess purchasing power created by the reduction in alcohol sales, Gorbachev knows he must stock shelves with more and better quality items to provide incentives for increased productivity.

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Continuing a Soviet policy that began before he became Party Chairman early this year, Gorbachev has assigned his CEMA allies a key role in his plans.[1] The recently-released Long-Term Consumer Goods and Services Program (see inset) calls on Eastern Europe to boost exports of finished consumer goods and light industrial equipment and to expand cooperation in the development of textile raw materials. Moscow is pushing these demands in bilateral trade accords and CEMA agreements.

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This memorandum summarizes and assesses a Soviet study prepared in connection with the Long-Term Consumer Goods and Services Program. The study reveals Moscow's perceptions about the East Europeans' past performance as well as Soviet plans to gain a greater share of its allies' output of soft goods.[2]

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The Report

In January 1985, a senior Soviet economist at the CEMA Institute in Moscow passed to our Embassy a confidential study entitled "Tendencies in the Development and Exchange of Light Industrial Products in CEMA," prepared by a Soviet interagency group working on the Long-Term Consumer Goods and Services Program. This group, which operated under the direction of Politburo member Geydar Aliyev, was established in the spring of 1984 to examine problems plaguing soft goods production in CEMA countries and to make policy recommendations to a Politburo

1 CEMA—the Council for Mutual Economic Assistance—is made up of the USSR, Poland, East Germany, Czechoslovakia, Hungary, Bulgaria, Romania, Mongolia, Cuba, and Vietnam.

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2 Soft goods—an important consumer branch—include textiles, clothing, shoes, and other wearing apparel.

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commission. According to our source, the report was prepared for a select group of high-level Soviet officials. We believe Gorbachev almost certainly read the gloomy forecast before assuming the leadership reins. 25X1

A Neglected Industry

Although CEMA countries lead the developed West in the production of cotton textiles and leather footwear, the Soviet assessment notes that CEMA falls far behind in output of most other soft goods. The report scores perennially poor quality and assortment and singles out silk fabrics, knitted clothing, hosiery, and carpets as areas where the gap between CEMA and the West is widest. 25X1

During the 1971-83 period, soft goods industries across the region posted the lowest growth rate of all industrial sectors, reflecting a low priority in resource allocation and a weak commitment--despite the rhetoric of the Soviet and East European leaders--to improving light industrial output. Production grew slowly in the late 1970s before stagnating--and, in a few cases, declining--in 1981-83 (See table 1). 25X1
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in the USSR, where the drop was sharpest, output fell well below plan goals. 25X1

The confidential study abounds with Soviet irritation over lack of support from Eastern Europe and attributes--correctly, in our opinion--CEMA's sluggish performance to five major factors:

- Shortages of Raw Materials. Because of production problems, the USSR--CEMA's major supplier of raw materials--was forced to limit deliveries to Eastern Europe of cotton, leather, and chemical fibers. As a result, CEMA countries[3] received only two-thirds of the raw materials required to achieve planned output in textiles and knitwear in the early 1980s. Soviet cotton production, for example, declined for the fourth consecutive year in 1984 and has suffered a long-term drop in quality. Moscow turned to international cotton markets to prop up Eastern Europe's production of cotton textiles. Cotton fabrics currently account for roughly 70 percent of total CEMA fabric output. The East Europeans, however, undermined Moscow's efforts by re-exporting raw materials to the West to earn hard currency. Moreover, shortfalls in chemical fiber output throughout the region stymied plans to switch to polyester and other easy-care fabrics. 25X1

3 Excluding Vietnam and Mongolia. 25X1

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- Insufficient Investment. Planners in Eastern Europe and the Soviet Union reduced the share of investment allocated to light industry in 1976-80 and focused on reconstruction and retooling within light industry. This resulted in postponement of new construction and production shutdowns while factories were overhauled. 25X1

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- Aging and Obsolete Capital Stock. Because the USSR, in particular, experienced serious problems in machine building for light industry--due to low quality steel inputs and difficulties in transition to large-scale production of new types of equipment--soft goods machinery was kept in use past its standard lifespan. An aging capital stock led to an increase in breakdowns. Annual production of critical spinning equipment and weaving looms in the USSR dropped 5.8 percent and 4.6 percent, respectively, during 1976-83. Eastern Europe allowed its domestic production of equipment for light industry to atrophy, relying instead on purchases of advanced equipment from the West. The Soviet study notes that 80 percent of Hungary's new soft goods equipment came from Western Europe and the US. Czechoslovakia, a world leader in the development and production of textile machinery, proved the exception by expanding its domestic machinery output markedly. 25X1

- Declining CEMA Trade. A shift in East European exports of consumer goods to hard currency markets exacerbated shortages of soft goods, particularly in the USSR. After moderate growth in the 1970s, CEMA trade in soft goods slumped between 1980 and 1983. A decline in East European exports accounted for most of the drop. Reciprocal trade in textiles and leather footwear dropped by more than 12 percent during the period, according to Soviet statistics cited in the report. Growing Soviet demand for these goods had little apparent impact on East Europe's priorities. In response to the region's financial crisis in the early 1980s, East European countries increased sharply the share of clothing and shoes sold to the West for hard currency. By 1983, over half of Hungarian clothing exports went to Western buyers, compared to one-fifth in 1970. Poland and Romania sold nearly 70 percent of their leather footwear exports to the West in 1983--more than double the shares in 1970 (See table 2). 25X1

- Failure of CEMA Specialization Agreements. CEMA members have yet either to conclude or implement a number of cooperation agreements under the Long-Term Target Program

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for Industrial Consumer Goods approved in 1980.[4] The Soviets are most concerned about the lack of results from CEMA cooperation programs in natural and synthetic raw materials and specialized equipment.

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The Road Ahead: Continued Stagnation

Based on data provided by the CEMA Permanent Commission for Light Industry and unnamed Soviet consumer organizations, the Soviet working group presented two pessimistic estimates of per capita production of soft goods in CEMA countries for 1990 and 2000.[5] The "best case" scenario assumes that the draft CEMA targets in the Soviet Long-Term Consumer Goods and Services Program will be achieved (see table 3). These yet-to-be announced goals call for large jumps in output during 1985, with growth then decelerating slowly through the year 2000.[6]

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Under this optimistic scenario, projected CEMA per capita production for most soft goods exceeds established Soviet consumption norms (see table 4).[7] However, glaring production shortfalls remain in leather footwear and knitwear--a much sought-after consumer item for its easy care and fashion appeal.

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An alternative forecast--and the one considered most realistic by our source because of investment constraints--is even more pessimistic about supplies for CEMA consumers in the year 2000. These projections reportedly are based on current growth rates, although no exact figures are specified. Textiles and knitwear represent areas of particularly sluggish growth, and

[4] In the late 1970s CEMA launched five Long-Term Target Programs designed to guarantee and direct CEMA integration through 1990. The programs covered energy and raw materials, agriculture and the food industry, machine building, transportation, and industrial consumer goods.

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[5] The report draws heavily on production and trade statistics for its analysis. Our Embassy was allowed to read, but not retain a statistical appendix to the report.

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[6] Although the Soviets published ambitious plans for domestic soft goods production under the Long-Term Program, we have seen no mention of CEMA goals.

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[7] The Soviets have established "rational norms" for consumption. These norms set standards for how much an average Soviet citizen should consume in food, housing, clothing, and other goods and services. They generally represent a comfortable living standard, albeit a lower one than in the West.

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our source notes that supplies of several products not included in the report are forecast to remain unchanged over 1981 levels in the year 2000.

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Prescription for Improvement

Recommendations to avert these dismal projections focus on the well-worn theme of increasing CEMA coordination and integration. The report places a high priority on tapping new sources of raw materials. East European countries expect their needs for textile fibers to exceed the region's production by 50 percent in 1990. The working group proposes that CEMA:

-- Seek out raw materials on LDC markets. Candidates for imports include the poorer CEMA countries of Vietnam, Mongolia, and Cuba, which have the agricultural base and manpower to supply East European soft goods factories.

-- Step up existing scientific and technical programs to develop new synthetic fabrics and to make use of raw materials byproducts.

-- Finance joint investments to construct spinning mills in the Soviet Union. Following the pattern of past projects, the East Europeans would supply investment, labor, machinery, construction materials, and technical assistance to build factories in the USSR. In exchange, they would receive a share of the plant's output. This would permit Moscow to export higher-value yarn instead of raw cotton to Eastern Europe.

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The report also recommends modernization of the capital base, while reducing dependence on Western machinery and equipment. Developed countries currently account for more than 40 percent of CEMA's total imports of light industrial equipment. To avoid further reliance on the West, CEMA should:

-- Complete and rapidly implement stalled agreements on specialized machine building to overcome shortages of knitting, dyeing, sewing, and footwear equipment. If these agreements are not pushed through under the CEMA Long Term Target Program by 1986, our source claims that light industrial machine-building enterprises will not begin work on these sought-after specialized machines until the 1990s. Technology can be upgraded by expanding production of shuttleless looms, high speed carding equipment, and pneumatic mills.

-- Coordinate purchases of new technology on Western markets to avoid duplication.

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-- Establish a separate interbranch group to coordinate CEMA-wide planning in other industries involved in soft goods production, including agriculture, light industrial machine building, and the chemical industry.

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Boosting Soviet imports of soft goods from Eastern Europe rounds out the recommendations. Our source and his colleagues call for East European exports of soft goods to the USSR to increase by the year 2000 by at least one-third over 1981-85 levels.[8] While Moscow won grudging commitments from its East European partners to provide more and better consumer goods at the CEMA Summit in June 1984, this is the first time we have seen a specific goal. Such demands reflect current Soviet efforts to ease their burden of support for Eastern Europe through more balanced trade. Moscow has made it clear it expects more consumer goods in exchange for oil and gas deliveries to the rest of CEMA. To pave the way for this heightened trade with Eastern Europe, the report recommends that:

-- The CEMA Commission on Foreign Trade develop incentives to stimulate intra-CEMA exports, study the reasons for the higher quality of East European hard currency exports, and suggest ways to redirect East European trade with the West to the USSR.

-- CEMA foreign trade ministers draft measures to improve the assortment of goods in direct trade between CEMA soft goods producers and retail traders. Possible mechanisms include border trade, contacts between national department stores, and trade fairs.[9]

-- Stricter sanctions be imposed for the delivery of poor quality goods and prices be lowered for less desirable products.

-- Coordination of CEMA consumer goods agreements and contracts be simplified.

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This strategy fits in well with the long-standing Soviet campaign for CEMA unity, represents a relatively low cost to the East Europeans, and paves the way for stronger Soviet measures down the road. In our view, these proposals could be marginally helpful, but are no substitute for a change in CEMA priorities and increased investment in soft goods industries.

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[8] It is not clear how this growth is calculated, but evidence suggests 1984 foreign trade rubles form the price base.

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[9] Border trade refers to goods exchanged by production enterprises located close to national boundaries.

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Soviet Reaction

According to our source, the report sparked sharp debate among those formulating Moscow's Long-Term Consumer Goods and Services Program. There was little apparent disagreement with the assessment's analysis or projections, but participants clashed over how to solve the Soviet soft goods industry's problems. Although the report itself did not directly recommend increased investment, the source acknowledged to US Embassy officers that insufficient investment was the major bone of contention. Key members of the State Planning Committee were unwilling to shift scarce funds from other sectors. Indeed, Gorbachev will be hard pressed to find the resources needed to pursue his goals of modernizing the heavy industrial base and maintaining his commitment to defense and at the same time providing investment to boost consumption levels. A high-ranking Soviet official recently acknowledged that problems will continue in the consumer sector and few additional resources will be made available to overcome them.

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Inclusion of measures to expand CEMA cooperation in textile raw materials and machinery development suggest the report had some influence on the Soviet Long-Term Program. We may see other effects of the report in CEMA trade agreements for 1986-90. Harsh criticism of the East Europeans and a desire to minimize resistance to programs for increased CEMA integration and trade, however, make it likely that the report--even in a diluted version--will remain in Soviet internal circles.

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Implications for Eastern Europe

The report signals new Soviet toughness toward Eastern Europe in providing additional support to the USSR's soft goods industry. The Soviet leadership will likely push its allies to:

-- Supply even larger amounts of high quality finished consumer goods and light industrial equipment.

-- Increase imports of textile raw materials on international markets.

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-- Give Moscow greater influence in decisions to purchase Western machinery.

-- Fulfill its CEMA commitments for scientific and technical cooperation.

We expect the East Europeans to test Moscow's resolve. The attitudes of East European populations toward their regimes are heavily dependent on the availability of consumer goods, and the raising of living standards is the chief accomplishment that the leaders can claim. The prospect of diverting increasing shares

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of consumer goods to the Soviet market implies a bleak future for growth in East European living standards, which in turn means a reduction in the grudging support of the populations for their regimes. 25X1

Moreover, most of the East European countries depend heavily on exports of consumer goods to earn hard currency. While the region largely has recovered from the financial crisis of the early 1980s, hard currency exports are still a high priority for the long term. Eastern Europe continues to require hard currency earnings to pay debt service and to generate import capacity to buy materials and technology from the West. 25X1

Moscow's effort to force Eastern Europe to devote more attention to satisfying the Soviet market at the expense of Eastern Europe's hard currency sales and domestic supplies is likely to lead to strained negotiations and warnings by East European leaders of the risks of major changes in allocation of supplies of consumer goods. Both sides have taken these positions for many years, but the apparently strengthened Soviet determination combined with Eastern Europe's greater needs leads us to expect more bickering than ever between Moscow and its allies. 25X1

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INSET

The USSR's Long-Term Consumer Goods Program

As a supplement to the Food Program--approved in 1982--work began on the Long-Term Nonfood Consumer Goods and Services Program through the year 2000 under General Secretary Andropov. Discussion of the Program continued under the Chernenko leadership, but completion was delayed by debate about whether to commit the resources to support the program. Statements in the Soviet press published near the end of Chernenko's tenure showed Soviet planners had agreed on measures to expand the range of footwear output and to improve personal care and telephone services. [redacted] 25X1

The Politburo gave final approval to the complete consumer goods program in September, and details were published in mid-October. The program sets ambitious goals for domestic output of items such as consumer durables and soft goods, and for services including communications, public transport, housing repair, and personal care. Soviet commentary on the program suggests that gains are to come largely from more efficient use of existing resources.

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No specifics were given on Eastern Europe's role in the program, but Moscow repeated its now standard exhortations for increased deliveries of consumer goods and machinery as well as expanded scientific cooperation. [redacted] 25X1

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Table 1

CEMA: Average Annual Growth of Selected Soft Goods Production[a]

	Percent		
	1971-75	1976-80	1981-83
Textiles	2.5	1.2	0.1
--Cotton	2.0	1.2	0.02
--Wool	2.7	0.8	-1.7
--Silk	4.9	2.7	2.4
Knitted outerwear	5.5	2.4	-0.1
Knitted undergarments	3.9	3.2	0.1
Hosiery	3.0	2.8	2.3
Leather footwear	1.7	1.4	0.5

[a] Does not include Vietnam.

Source: Tendentsii razvitiya proizvodstva i obmena izdeliy legkoy promyshlennosti (Tendencies in the Development and Exchange of Light Industrial Products in CEMA) (Moscow, 1984).

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Table 2

Eastern Europe: Shares of Selected Soft Goods Exports Sold to the Developed West

	Percent	
	1970	1983
Knitted Garments		
Bulgaria	0.9	12.6
Hungary	20.0	31.0
East Germany	18.1	25.8
Clothing And Linens		
Bulgaria	3.9	9.9
Hungary	20.6	55.0
East Germany	25.8	35.4
Poland	14.2	30.9
Leather footwear		
Bulgaria	6.4	20.5
Poland	22.6	69.5
Romania	30.0	67.6

Source: Tendencies in the Development and Exchange of Light Industrial Products in CEMA, (Moscow, 1984).

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Table 3

CEMA: Draft Targets for Average Annual Growth in Production of Selected Soft Goods[a] [b]

	Percent			
	1985	1986-90	1991-95	1996-2000
Textiles	6.9	2.8	1.7	2.2
Cotton	3.7	1.9	1.4	0.9
Wool	8.0	1.8	1.0	0.8
Silk	3.8	6.8	5.0	4.0
Hosiery	3.8	2.6	1.9	1.3
Knitwear	4.0	3.3	3.3	2.0

[a] Proposed under the Soviet Long Term Consumer Goods and Services Program. Although the Soviets announced domestic production goals for light industry in the final version of the consumer goods program eleased in October 1985, they have yet to publish similar growth targets for CEMA. [redacted] 25X1

[b] Does not include Vietnam.

Source: Tendencies in the Development and Exchange of Light Industrial Products in CEMA, (Moscow, 1984). [redacted] 25X1

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Table 4

CEMA: Per Capita Production of Selected Soft Goods
As a Percent of Soviet Consumption Norms[a]

	1970	1983	1990	2000 Low[b]	2000 High[c]
Textiles	72.6	78.7	96.7	85.2	110
Cotton	88.1	93.1	103.2	na	109
Wool	81.5	83.2	99.6	91.9	102.4
Silk	49.3	68.9	96.7	85.4	141.2
Knitwear	43.4	56.0	66.6	na	81.2
Knitted outergarments	na	na	na	68.0	na
Knitted undergarments	na	na	na	61.5	na
Hosiery	67.3	86.2	99.2	na	109.6
Leather footwear	84.6	90.3	90.7	na	91.0

[a] The working group applied the Soviet consumption standard to other CEMA countries.

[b] Projections based on current—although unspecified—growth rates. East European projections include exports and accordingly overstate these CEMA-wide totals. We were unable to acquire the statistical appendix which disaggregates these forecasts by country. 25X1

[c] Projections based on draft target growth rates for the Soviet Long-Term Consumer Goods and Services Program. See table 3 25X1

Source: Tendencies in the Development and Exchange of Light Industrial Products in CEMA, (Moscow, 1984). 25X1

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